CCIS
California Credit Information Solutions

Insta Screen Reference Guide

Ordering Reports

1) Create a shortcut or put this link in your "Favorites" https://www.instascreen.net/cacreditinfo/login.php

2) Login with your user name and password

Note: If you have lost or forgotten your user name or password, call (888) 433-0090. Your password must always be at least eight characters, alpha-numeric (combination of letters and numbers).

2) Place your cursor over **'Order'** and select **'Report'**

3) Select the products/services you wish to include in your report and then select **'Order Product'**

*Note: **'Clear Form'** will uncheck all selected products/services. **'Cancel'** will redirect you back to the Home Page*
Package reports will not allow you to choose from a list of products; instead, you will be directed to the data entry page

4) Enter your applicant's information.

Reference - Not a required field. The information supplied in the reference field will display on your invoice
Soc Sec – Social Security Number. The system will insert the dashes automatically. Required for a credit report and county/statewide background check.
DOB – Date of Birth. The system will automatically insert the dashes. MM/DD/YYYY format. Required for a criminal background check.
PreSearch – Select PreSearch to query the system for matching names, social security numbers and/or dates of birth you may have already entered./ Social Security Charges apply
Addr Type – US, P.O. Box, Military or Rural Route.
Number – House Number.
Dir – East, West, North, South, North East, North West, South East, South West
Type – Street, Blvd, Lane, Square, Drive, etc.

Tip: With the Jurisdiction tool on. Entering the zip code before entering the city and state will allow for faster data entry; the system will automatically select and fill in the appropriate city and state based on the zip code.

Investigative

If you have selected the Nationwide Database Search, Instant Criminal Statewide or County Criminal Search as part of your report, this section will be visible. Based on the zip codes you provided in the address history, the system will have already selected the appropriate State(s) and/or County(s) to search for criminal records. You may add Counties and/or States manually by selecting the **Select Counties** / **Lookup Counties** or **Select States** / **Lookup States** option. You may also delete Counties/States by clicking **Delete** to the right of the County(s) or State(s) already selected.

Note: If the system did not automatically select the appropriate jurisdictions to search, you may have a pop-up blocker on your system. To disable pop-up blockers, select "Allow pop-ups from this site only" from your pop-up blocker program.

Verifications

If you have selected Employment Verification as part of your report, this section will be visible. Enter your applicant's information in the appropriate data entry fields. To add additional employers to your report, simply select **Add Employer**. Employers can also be removed by selecting **Remove Employer**. (same process applies for other verifications)

Requestor – Choose the appropriate name from the drop down menu. The system will automatically assign the name of the individual logged in as the requestor.

5) At this point, you should check all of the information you have entered for accuracy. Once the order has been submitted, the account will be charged.

6) Click on **'Submit Order'**

*Note: **'Clear Form'** will erase all data you have entered. **'Cancel'** will redirect you back to the Home Page.*
If there is any required information missing, the system will notify you and highlight the appropriate field(s) in yellow.

7) The system will now order the report and deliver the instant product(s) in your report. Click **'Continue'** when prompted and you will be directed to **'Results'** page to view and/or print your report.

The 'Results' Page

You will be directed to the **'Results'** page:

- After ordering a report
- After clicking the **'Results'** button when selecting a report from the **Find** or **Workspace** Menu searches
- After clicking on the applicants name when selecting from the **Find** or **Workspace** Menu searches
- After clicking the **'Results'** button when viewing a report or product

From the **Results** page, you can **View**, **Print** or **Fax** the entire report by clicking the appropriate option from the top of the screen. Each product in the report can be viewed individually by clicking on the product name under the **'Product(s)'** heading.

In addition, the **Results** page allows you to add products to the existing order (**Add to Order**), order an entirely new report on your applicant (**New Order**), and send **Employment** letters.

To add additional products to an existing file, select **'Add to Order'** from the bottom of the **Results** page. Next, select the products you would like to add to the existing report and click **'Order Product'**

Note: Only products which were not included as part of the original report will be available for order.

To send an Employment letter, simply choose the letter you wish to send from the drop down menu marked **'Select Letter'** from the **Results** page and click **'Print Letter'** The system will pre-populate the letters with the applicant's name and address ready for printing and mailing. The letters will fit in a number 10 windowed envelope.

Note: The Employment letters are customizable. To modify the letter, simply place your cursor in the body of the text to erase, add or rewrite as needed.

File Number – Every report will be assigned its own unique File Number. The File Number is helpful when calling Customer Service or for looking up the report from the **'Find'** menu
Report To – Your name or company name

Assigned To – If your report requires additional work or verification the name of the Customer Service Representative working on your report will be listed here. Otherwise, this field will be listed as 'Unassigned'
Order Date – This is the date and time your report was ordered
Report Date- This is the date and time your report was completed

The 'Find' Menu

The **'Find'** menu provides several different ways to search for previously ordered reports in the system- these include:

List Last - 10, 25, 50, 100, 200 (Reports Ordered)

*Note: When searching using the **'List Last'** feature, reports will be listed in date order beginning with the most recent report ordered. Reports can be sorted several different ways by clicking on any of the available column headers.*

Simple Search – The 'Simple Search' feature provides a more specific way to search for previously ordered reports. Simple Search allows you to search by Last Name, Social Security Number, File Number or Reference Number.

Tip: By entering just a portion of the last name, social security number, file number or reference number in the 'Search Terms', the system will return results matching the portion you entered. Example- Search By: Last Name / Search Terms = Smi; InstaScreen will return ALL reports on individuals whose last name begins with ' Smi ' such as Smiley, Smith, Smitz and so on.

Advance Search – The 'Advance Search' feature allows for the entry of multiple 'search terms'. Enter one or more search terms and click **'Search.'**

The 'Workspace' Menu

Use the **Workspace** menu to quickly access any **'Pending Reports'** and **'Completed Reports.'**

Pending Reports – These are reports which require additional work from our processing dept. To view the exact status of individual products within a report, click on the first or last name of the applicant, to be directed to the **'Results'** page, or click the button to the left of the report and then select **'Results'** at the top of the page. Each product in the report will be listed as either complete or incomplete. When all of the products in the report are complete, the report will be moved from the **'Pending Reports'** page to the **'Completed Reports'** page.

Completed Reports – This page will list the last 200 reports ordered under your account. Reports will be listed in date order beginning with the most recently completed report. Reports can be sorted several different ways by clicking on any of the available column headers.

The 'Admin' Menu

The **Admin** menu options include:

Change Password – When prompted, enter your **Old** (current) **Password** then your **New Password** in the appropriate fields. Click **'OK'**

*Note: **'Clear'** will clear the screen; **'Cancel'** will redirect you to the Home page.*

View Invoices – Click on the invoice you wish to view, or check the box next to the invoice and select **'View Selected'** at the top of the screen. To print an invoice, check the box next to the invoice and select **'Print Selected'** at the top of the screen. To view and/or print multiple invoices, check the box next to **'Company'** to select all, and then select either **'View Selected'** or **'Print Selected.'**

User / Add New User – From the **'User'** tab, enter the new user's information in the spaces provided. Next, designate the new user as either a 'User' or 'User Admin' from the **'Rights'** tab. Review the **'User Rights'** and **'User Account Status'** and make changes if necessary. The **'Other'** tab can be used to store additional information such as alternate telephone numbers and/or email addresses.

Note: The 'User Admin' has the rights to add new users to the account, change his or her password, view invoices, lock or make inactive 'User' accounts, order reports and view all reports on the system under the account.
A 'User' has the rights order reports, view only the reports he or she has ordered, and change his or her password.
It is VERY important that each person ordering reports from our system use their own user name and password. For accuracy and security purposes, please do not allow multiple users to share user names and passwords to order reports.

User / List All Users – Select this option to view all the users listed on the account. To make changes to a user's account, select the user by clicking on the user's name or by clicking on the button next to the user's name and then selecting **'Edit User'** at the top of the screen.

Note: User's which are no longer with your company or organization must be marked as **'Locked'** or **'Inactive'** by a **'User Admin.'** This will disable their user name and password and will not allow them access to the system any longer.

Jurisdiction Lookup – Use this tool to lookup county(s) and/or district courts by entering city and state or zip codes.

Log off

For security purposes, ALWAYS log off at the end of your session.

If you have questions or need assistance, please call us at (800) 476-2044